

About Strategic Sourcing Collaboration

Cardinal allows a Strategic Sourcing (SS) Buyer to select individuals (known as Collaborators) to participate in an Event. Collaborators may include the customer (user), the supervisor (Procurement Manager), subject matter experts, Evaluation Committee members and others. Collaborators can make comments, score, establish weights and share data with the SS Buyer and the other Collaborators. Suggested changes by a Collaborator can be accepted or rejected by the SS Buyer. All collaboration is maintained within Cardinal as a record of participation.

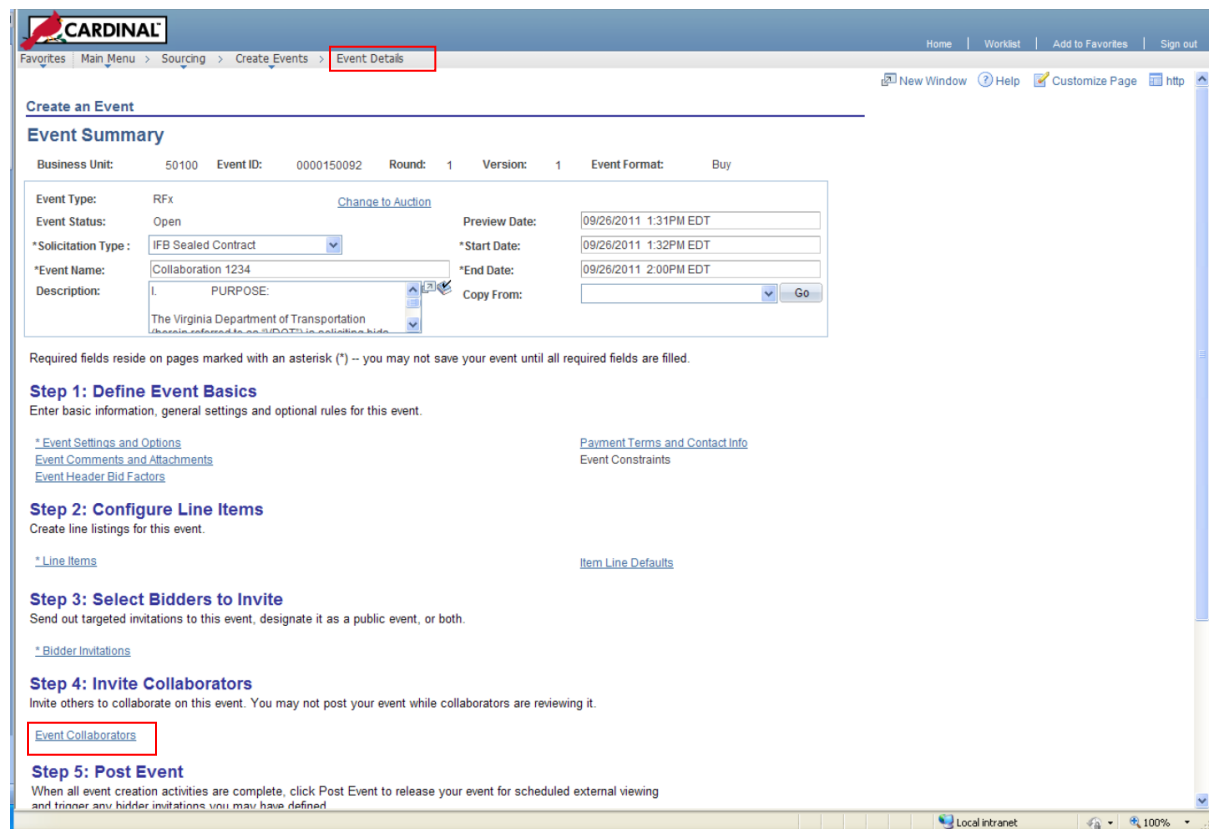
1. Select Collaborators for an Event (SS Buyer):

- 1 Collaborators are added to an event that has been created, or is in the process of being created. If needed, navigate to and open the event for editing. For more information on how to create an event, reference the **PROC 347: Strategic Sourcing** course. In this job aid, we navigating to an existing event.

Navigate to **Main Menu > Sourcing > Create Events > Event Details**.

- 2 Click on the **Find an Existing Value** tab to look up an existing event. The **Business Unit** field will default, do not change this value.
- 3 Specify the desired search criteria for the event and click the **Search** button.
- 4 Select the desired event from the search results.

The Event Summary page opens.



Event Summary

Business Unit: 50100 Event ID: 0000150092 Round: 1 Version: 1 Event Format: Buy

Event Type: RFx [Change to Auction](#)

Event Status: Open

* Solicitation Type: IFB Sealed Contract

* Event Name: Collaboration 1234

Description: I. PURPOSE: The Virginia Department of Transportation

Preview Date: 09/26/2011 1:31PM EDT

* Start Date: 09/26/2011 1:32PM EDT

* End Date: 09/26/2011 2:00PM EDT

Copy From: [Go](#)

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)

[Event Comments and Attachments](#) [Event Constraints](#)

[Event Header Bid Factors](#)

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#) [Item Line Defaults](#)

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

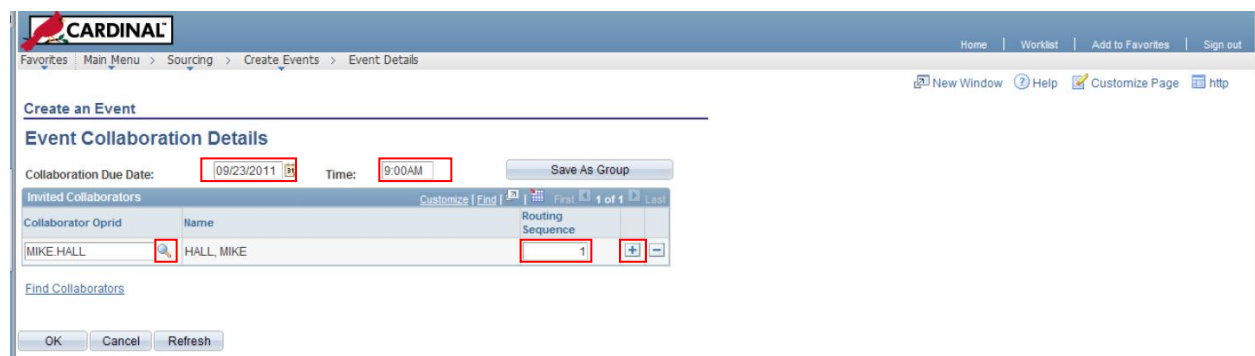
[Event Collaborators](#)

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

- Click the **Event Collaborators** hyperlink.

The **Event Collaboration Details** page appears.



Event Collaboration Details

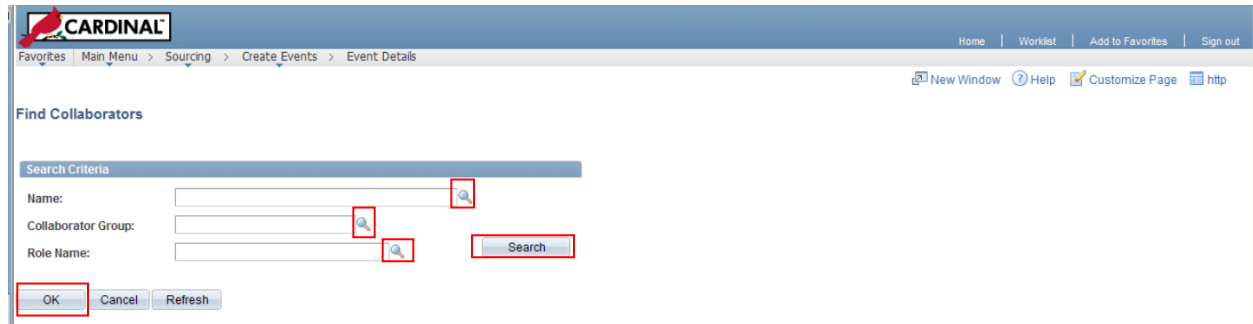
Collaboration Due Date: 09/23/2011 Time: 9:00AM [Save As Group](#)

Invited Collaborators	Collaborator Oprid	Name	Routing Sequence
MIKE HALL	HALL, MIKE	1	+ -

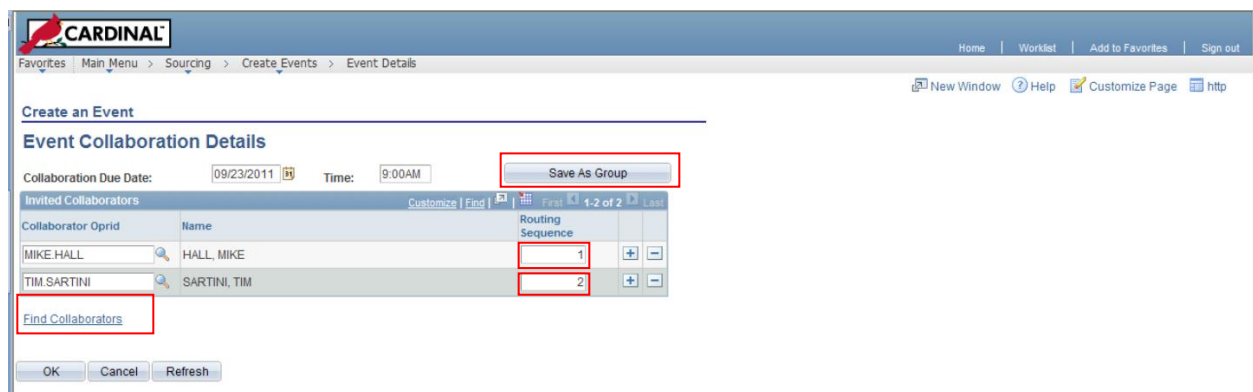
[Find Collaborators](#)

[OK](#) [Cancel](#) [Refresh](#)

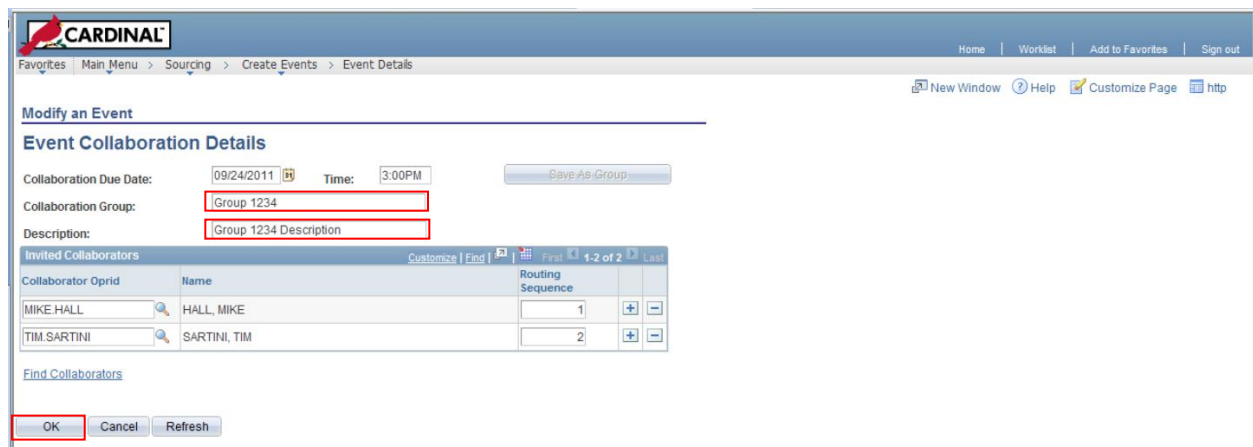
- In the **Collaboration Due Date** field, enter a deadline date and time for all collaboration to end.
NOTE: The **Collaboration Due Date** must be **prior** to the event Preview Date.
- In the **Collaborator Oprid** field, enter the Collaborator name (use the **Look Up** icon, if needed). The **Routing Sequence** number is automatically populated.
- Click the add **Add a new row** button at the end of the row to add another Collaborator and enter the **Collaborator Oprid**. **Note:** If necessary, you can search for Collaborators or Groups by clicking the **Find Collaborators** hyperlink.
 - You may search by **Name**, **Collaborator Group** or **Role Name**.



- b. Enter search criteria and click the **Search** button. From the results that appear, click the **Select** checkbox to select collaborators and click the **OK** button.

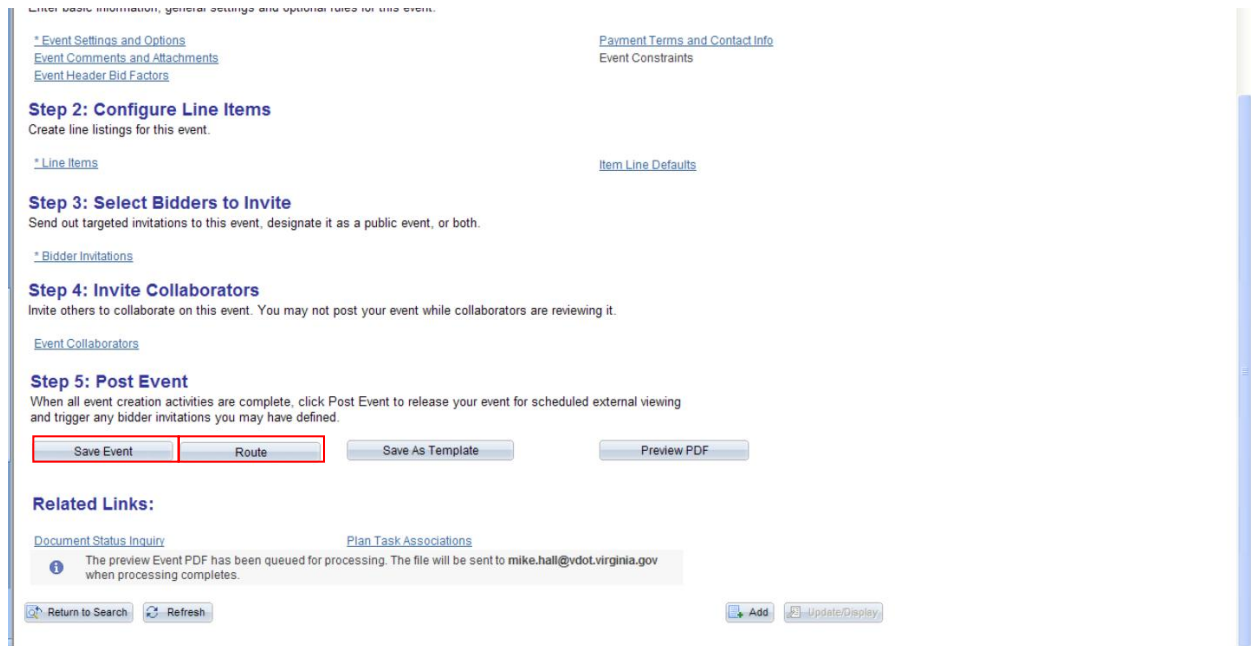


- 9 You may change the order of the **Routing Sequence** if you wish. The sequence number identifies the order in which the collaborators offer feedback.
- 10 If you wish to save the selected Collaborators as a group, click the **Save As Group** button.



- a. For the group you are saving, enter a name and description into the **Collaboration Group** and **Description** fields
- b. Click the **OK** button.
- 11 Click the **OK** button to return to **Event Summary** page.

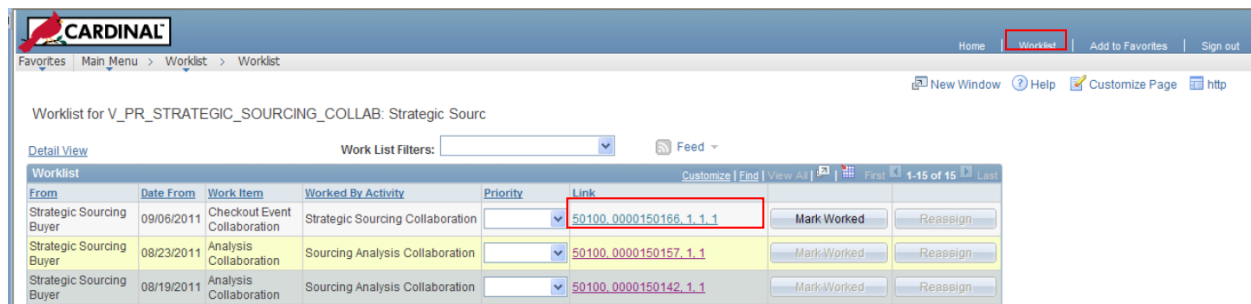
- 12 Click the **Save Event** button. Then, click the **Route** button.



- 13 Email notification is sent to each Collaborator and an item is added to each Collaborator's worklist.

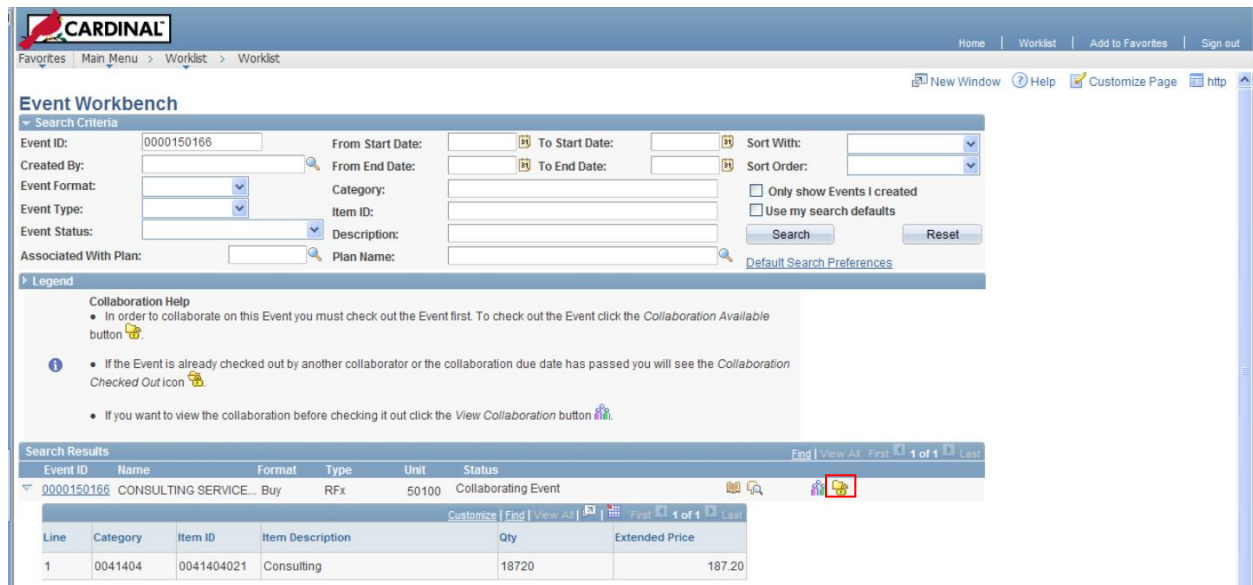
2. Collaborate on an Event (Collaborator):

- 1 To collaborate on an event, either click the **Collaborate on this event** hyperlink from the e-mail notification view the event from your worklist.
- 2 Navigate to **Main Menu > Worklist > Worklist**.
- 3 The Worklist appears.



From	Date From	Work Item	Worked By Activity	Priority	Link	
Strategic Sourcing Buyer	09/06/2011	Checkout Event Collaboration	Strategic Sourcing Collaboration		50100_0000150166_1_1_1	Mark Worked Reassign
Strategic Sourcing Buyer	08/23/2011	Analysis Collaboration	Sourcing Analysis Collaboration		50100_0000150157_1_1	Mark Worked Reassign
Strategic Sourcing Buyer	08/19/2011	Analysis Collaboration	Sourcing Analysis Collaboration		50100_0000150142_1_1	Mark Worked Reassign

- 4 Click the **Event** hyperlink for the event you wish to collaborate on. The event will be listed as **Checkout Event Collaboration** under the **Work Item** column.
- 5 The **Event Workbench** page appears.



Event Workbench

Search Criteria

Event ID: 0000150166 From Start Date: To Start Date: Sort With:
 Created By: From End Date: To End Date: Sort Order:
 Event Format: Category:
 Event Type: Item ID:
 Event Status: Description:
 Associated With Plan: Plan Name:
 Search Reset
 Default Search Preferences

Legend

Collaboration Help

- In order to collaborate on this Event you must check out the Event first. To check out the Event click the Collaboration Available button.
- If the Event is already checked out by another collaborator or the collaboration due date has passed you will see the Collaboration Checked Out icon.
- If you want to view the collaboration before checking it out click the View Collaboration button.

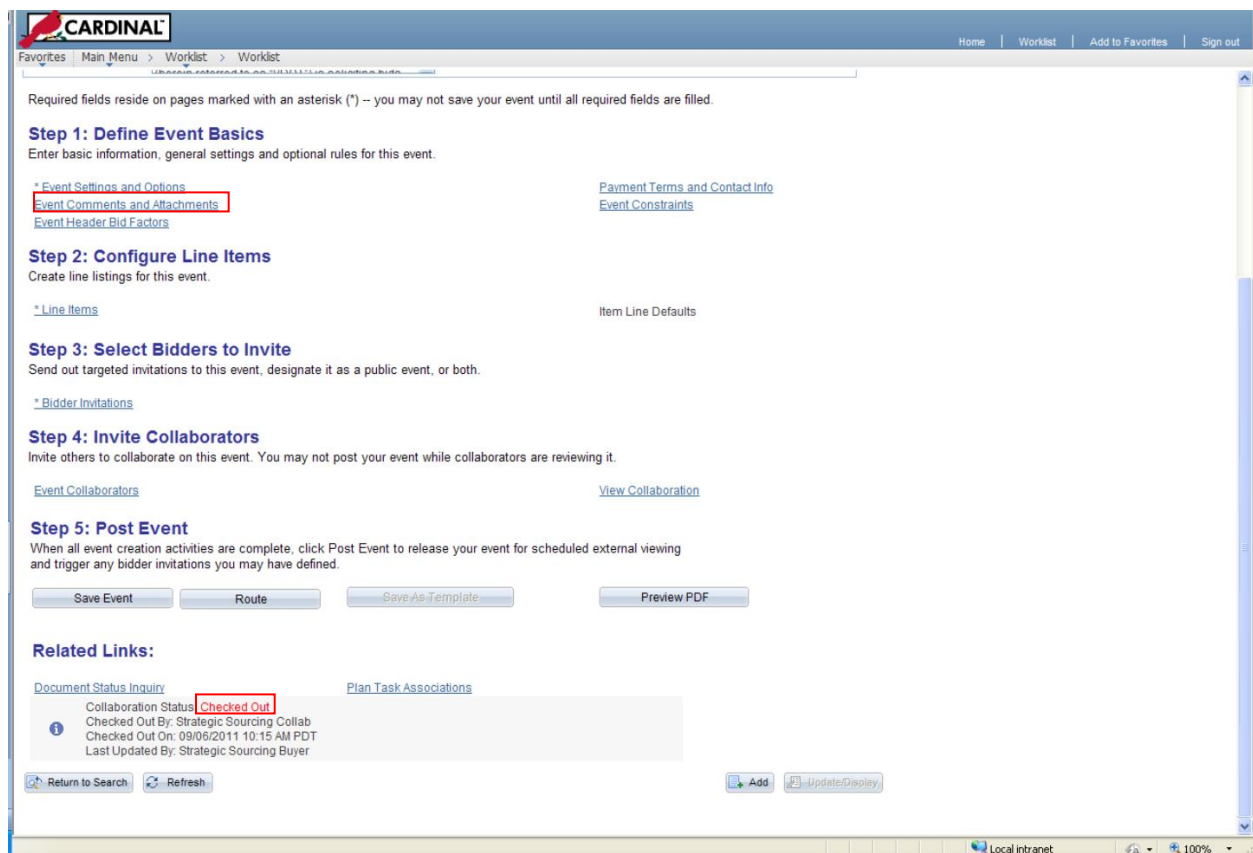
Search Results

Event ID	Name	Format	Type	Unit	Status
0000150166	CONSULTING SERVICE... Buy	RFX	50100	Collaborating Event	

Line Item Details:

Line	Category	Item ID	Item Description	Qty	Extended Price
1	0041404	0041404021	Consulting	18720	187.20

- Check out the event for collaboration, by clicking the **Check Out** icon.
- Collaboration Status** appears as Checked Out and includes details on when and by whom.
- To make edits or add comments, click the **Event Comments and Attachments** hyperlink.



Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
 Enter basic information, general settings and optional rules for this event.

* Event Settings and Options
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)
[Payment Terms and Contact Info](#)
[Event Constraints](#)

Step 2: Configure Line Items
 Create line listings for this event.

* Line Items
[Item Line Defaults](#)

Step 3: Select Bidders to Invite
 Send out targeted invitations to this event, designate it as a public event, or both.

* Bidder Invitations

Step 4: Invite Collaborators
 Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#)
[View Collaboration](#)

Step 5: Post Event
 When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

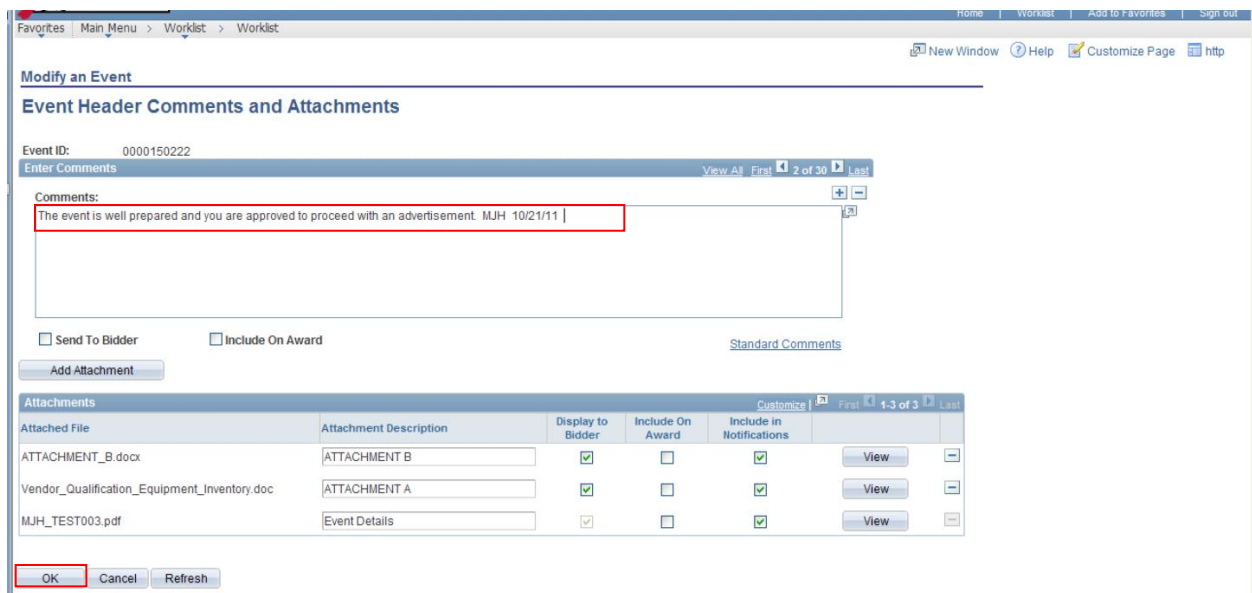
Save Event Route Save As Template Preview PDF

Related Links:

[Document Status Inquiry](#)
 Collaboration Status: **Checked Out**
 Checked Out By: Strategic Sourcing Collab
 Checked Out On: 09/06/2011 10:15 AM PDT
 Last Updated By: Strategic Sourcing Buyer
[Plan Task Associations](#)

Return to Search Refresh Add Update/Display

a. Enter comments in the **Comments** field.



Modify an Event

Event Header Comments and Attachments

Event ID: 0000150222

Enter Comments View All First 2 of 30 Last

Comments:

The event is well prepared and you are approved to proceed with an advertisement. MJH 10/21/11

☐ Send To Bidder ☐ Include On Award [Standard Comments](#)

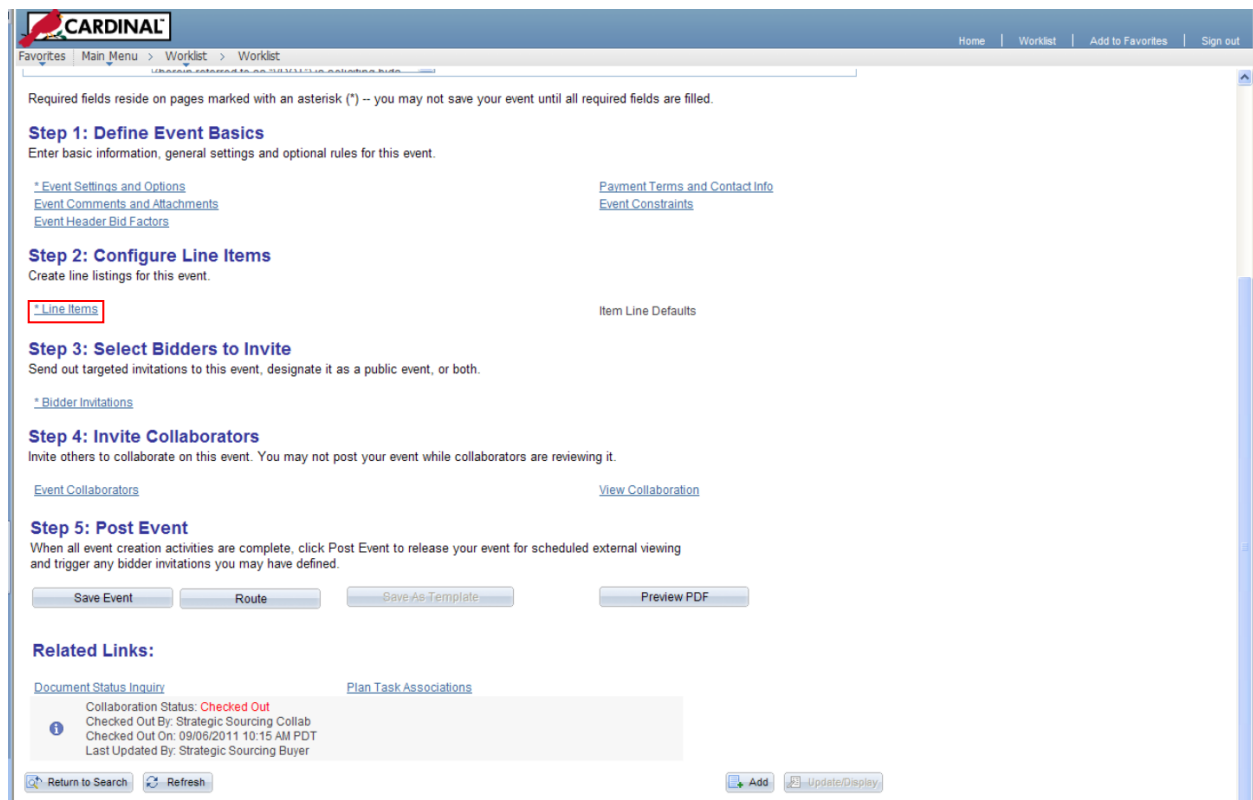
Add Attachment

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
ATTACHMENT_B.docx	ATTACHMENT B	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View
Vendor_Qualification_Equipment_Inventory.doc	ATTACHMENT A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View
MJH_TEST003.pdf	Event Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View

OK Cancel Refresh

b. Click the **OK** button.

9 To modify the event lines, click the **Line Items** hyperlink.



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[Event Collaborators](#) [View Collaboration](#)

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[Save Event](#) [Route](#) [Save As Template](#) [Preview PDF](#)

Related Links:

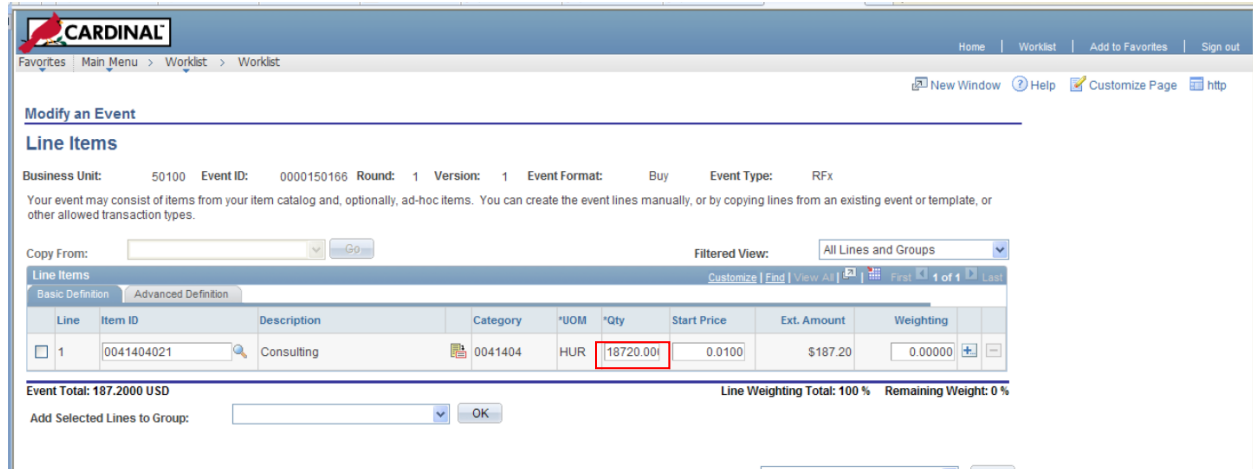
[Document Status Inquiry](#) [Plan Task Associations](#)

Collaboration Status: **Checked Out**
Checked Out By: Strategic Sourcing Collab
Checked Out On: 09/06/2011 10:15 AM PDT
Last Updated By: Strategic Sourcing Buyer

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

a. The **Line Items** page appears.

- b. The initial line quantity appears in the **Qty** field for each line.
- c. Change the value in this field, if applicable.



Modify an Event

Line Items

Business Unit: 50100 Event ID: 0000150166 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go

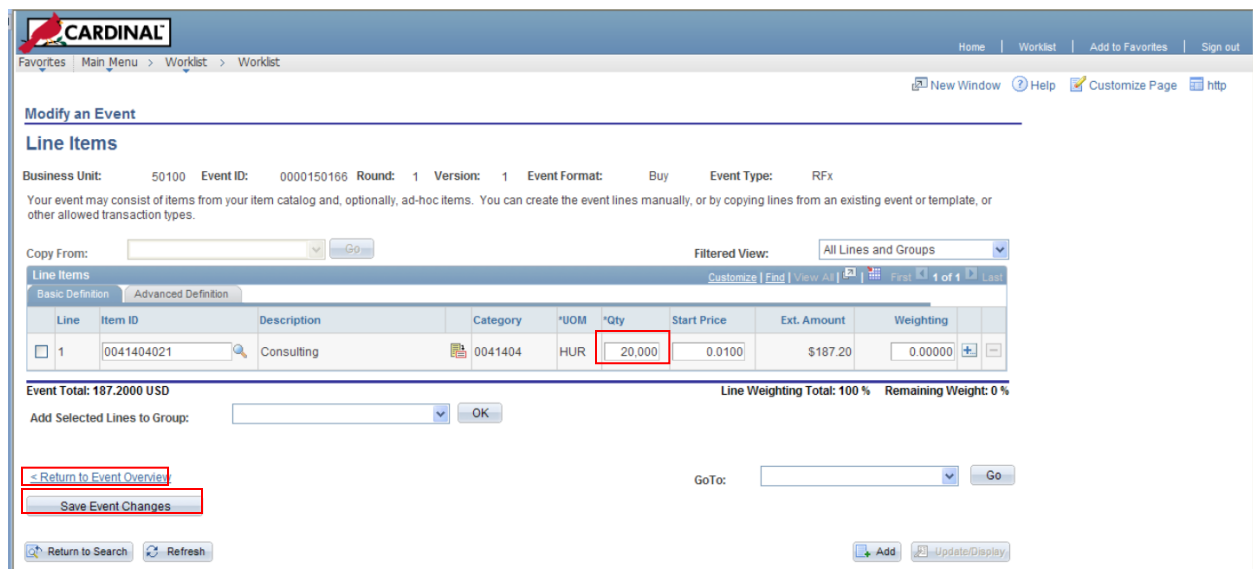
Filtered View: All Lines and Groups

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	0041404021	Consulting	0041404	HUR	18720.00	0.0100	\$187.20	0.00000

Event Total: 187.2000 USD Line Weighting Total: 100 % Remaining Weight: 0 %

Add Selected Lines to Group: OK

- d. After you have made the all edits you wish enter, click the **Save Event Changes** button.



Modify an Event

Line Items

Business Unit: 50100 Event ID: 0000150166 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go

Filtered View: All Lines and Groups

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	0041404021	Consulting	0041404	HUR	20,000	0.0100	\$187.20	0.00000

Event Total: 187.2000 USD Line Weighting Total: 100 % Remaining Weight: 0 %

Add Selected Lines to Group: OK

[Return to Event Overview](#)

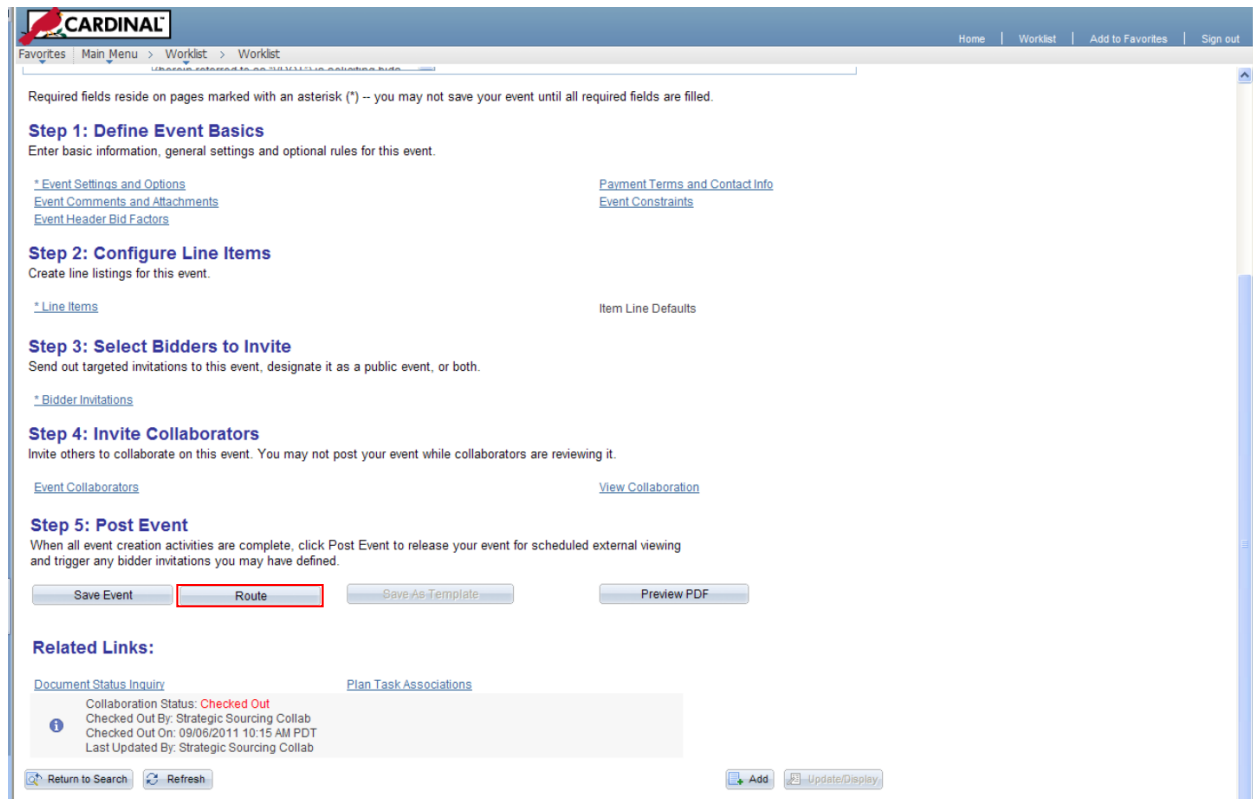
Save Event Changes

GoTo: Go

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

- e. Click the **Return to Event Overview** hyperlink.

10 Upon completion of all collaboration edits and/or comments, click the **Route** button.



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[Event Comments and Attachments](#) [Event Constraints](#)
[Event Header Bid Factors](#)

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[* Line Items](#) [Item Line Defaults](#)

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[* Bidder Invitations](#)

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[Event Collaborators](#) [View Collaboration](#)

Step 5: Post Event
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[Save Event](#) [Route](#) [Save As Template](#) [Preview PDF](#)

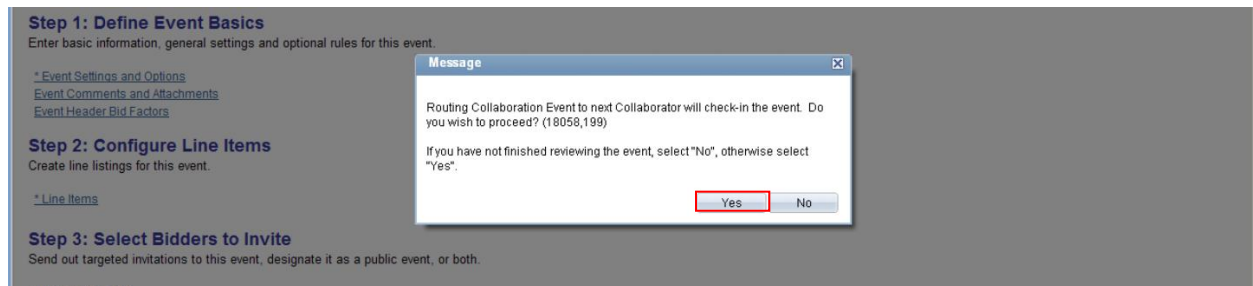
Related Links:

[Document Status Inquiry](#) [Plan Task Associations](#)

Collaboration Status: **Checked Out**
 Checked Out By: Strategic Sourcing Collab
 Checked Out On: 09/06/2011 10:15 AM PDT
 Last Updated By: Strategic Sourcing Collab

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

- 11** A routing message appears. To check in the event for the next Collaborator, click the **Yes** button.



Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

Message

Routing Collaboration Event to next Collaborator will check-in the event. Do you wish to proceed? (18058,199)

If you have not finished reviewing the event, select "No", otherwise select "Yes".

[Yes](#) [No](#)

- 12** **Collaboration Status** changes to Available. At any time, you can click the **View Collaboration** hyperlink to see any collaboration.



Procurement Job Aid

Strategic Sourcing Collaboration

CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Sourcing | Create Events | Event Details

The Virginia Department of Transportation

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)
[Event Comments and Attachments](#) [Event Constraints](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items
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[* Line Items](#) [Item Line Defaults](#)

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[Event Collaborators](#) [View Collaboration](#)

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

[Save Event](#) [Route](#) [Save As Template](#) [Preview PDF](#)

Related Links:

[Document Status Inquiry](#) [Plan Task Associations](#)

[Collaboration Status Available](#)
Last Updated By: Strategic Sourcing Collab

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

- Click the **Event Lines** hyperlink to view the original amount and any changes to the quantity by Collaborators.

CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Sourcing | Create Events | Event Details

New Window | Help | Customize Page | http

Review Event Collaboration

Business Unit: 50100 Event ID: 0000150166 Round: 1 Version: 1

Event Name: CONSULTING SERVICES STATEWIDE Format: Buy Type: RFx

[Event Header](#) [Event Lines](#) [Bid Factors](#) [Comments and Attachments](#) [Invited Bidders](#) [Constraints](#)

Filter By:

Event Line [Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

Line Nbr: 1 Item ID: 0041404021 Description: Consulting

Line Summary [Customize](#) [Find](#) [View All](#) [First](#) [1-2 of 2](#) [Last](#)

Field	Name	Date/Time	Action	Value
Qty	Original	09/06/2011 11:01:10AM	Update	18720
Qty	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000

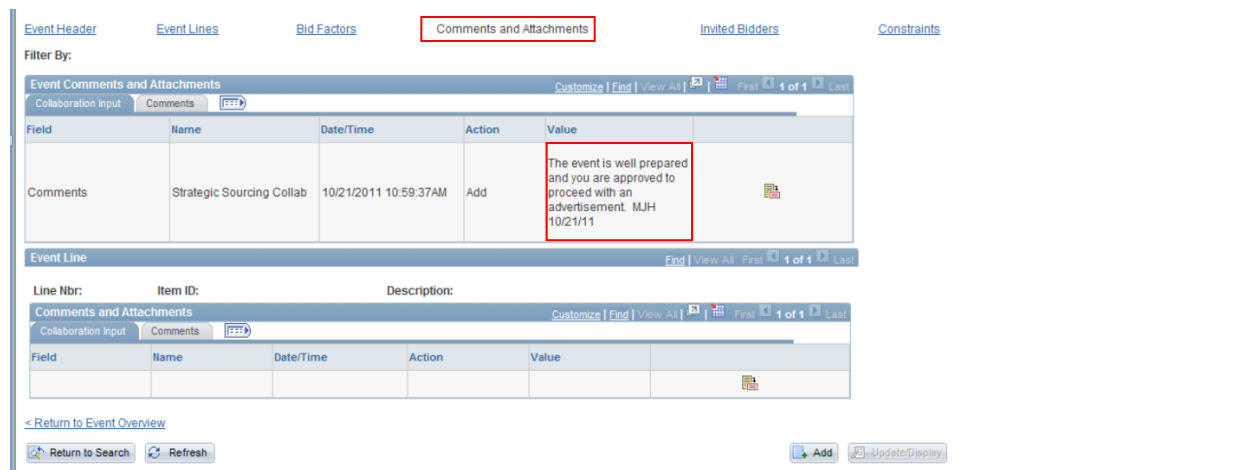
Line Details [Customize](#) [Find](#) [View All](#) [First](#) [1-2 of 2](#) [Last](#)

Field	Name	Date/Time	Action	Value
Max Quantity	Original	09/06/2011 11:01:10AM	Update	18720
Max Quantity	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000

[Return to Event Overview](#)

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

- Click the **Event Comments and Attachments** hyperlink to view any comments by Collaborators.



Event Header | Event Lines | Bid Factors | **Comments and Attachments** | Invited Bidders | Constraints

Filter By:

Event Comments and Attachments

Collaboration Input | **Comments** | [PDF]

Field	Name	Date/Time	Action	Value
Comments	Strategic Sourcing Collab	10/21/2011 10:59:37AM	Add	The event is well prepared and you are approved to proceed with an advertisement. MJH 10/21/11

Event Line

Line Nbr: | Item ID: | Description:

Comments and Attachments

Collaboration Input | **Comments** | [PDF]

Field	Name	Date/Time	Action	Value

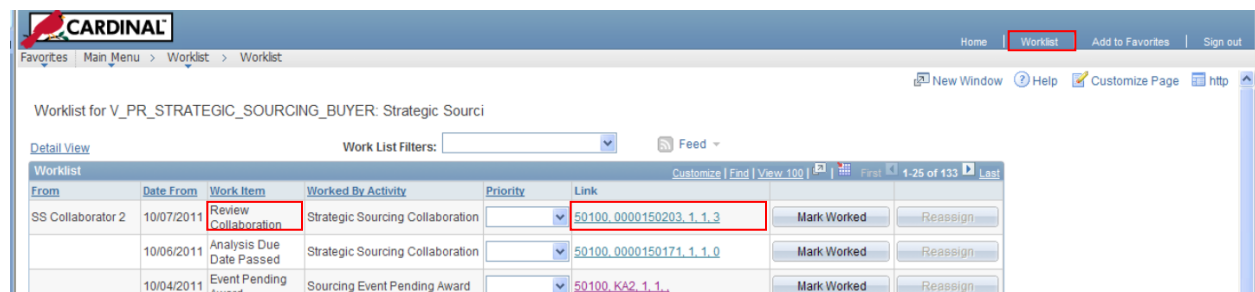
< Return to Event Overview

Return to Search | Refresh | Add | Update/Display

- 13 Email notification and a worklist item is sent to the SS Buyer indicating that collaboration has been completed by all selected Collaborators.

3. Review Collaboration on an Event (SS Buyer):

- 1 To review collaboration on an event, click the **Review the completed collaboration** hyperlink, from the email notification or you may view the event from your worklist.
- 2 Navigate to **Main Menu > Worklist > Worklist**
- 3 Click the event hyperlink for the event you wish to review. Notice that the description located in the **Work Item** column is **Review Collaboration**.



Home | **Worklist** | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

Worklist for V_PR_STRATEGIC_SOURCING_BUYER: Strategic Sourci

Detail View | Work List Filters: | Feed

From	Date From	Work Item	Worked By Activity	Priority	Link	
SS Collaborator 2	10/07/2011	Review Collaboration	Strategic Sourcing Collaboration		50100_0000150203.1.1.3	Mark Worked Reassign
	10/06/2011	Analysis Due Date Passed	Strategic Sourcing Collaboration		50100_0000150171.1.1.0	Mark Worked Reassign
	10/04/2011	Event Pending Award	Sourcing Event Pending Award		50100_KA2.1.1.	Mark Worked Reassign

- 4 Click the **Event Lines** hyperlink to view the edits and/or comments entered by each collaborator.

Procurement Job Aid

Strategic Sourcing Collaboration

Review Event Collaboration

Business Unit: 50100 Event ID: 0000150166 Round: 1 Version: 1

Event Name: CONSULTING SERVICES STATEWIDE Format: Buy Type: RFx

[Event Header](#) [Event Lines](#) [Bid Factors](#) [Comments and Attachments](#) [Invited Bidders](#) [Constraints](#)

Filter By:

Event Line: First View All First 1 of 1 Last

Line Nbr: 1 Item ID: 0041404021 Description: Consulting

Line Summary

Field	Name	Date/Time	Action	Value	Update	*Update Action
Qty	Original	09/06/2011 11:01:10AM	Update	18720	<input type="checkbox"/>	Accept
Qty	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000	<input type="checkbox"/>	Reject
Qty	SS Collaborator 2	09/06/2011 12:20:14PM	Update	35000	<input type="checkbox"/>	Reject

Line Details

Field	Name	Date/Time	Action	Value	Update	*Update Action
Max Quantity	Original	09/06/2011 11:01:10AM	Update	18720	<input type="checkbox"/>	Accept
Max Quantity	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000	<input type="checkbox"/>	Reject
Max Quantity	SS Collaborator 2	09/06/2011 12:20:14PM	Update	35000	<input type="checkbox"/>	Reject

- 5 Review the collaboration edits, and accept or reject each.
 - a. To accept a change, change **Update Action** to Accept and check the **Update** button.
 - b. To reject a change, change **Update Action** to Reject and check the **Update** button.
 - c. Click the **Comments** tab and enter comments as applicable.

Review Event Collaboration

Business Unit: 50100 Event ID: 0000150166 Round: 1 Version: 1

Event Name: CONSULTING SERVICES STATEWIDE Format: Buy Type: RFx

[Event Header](#) [Event Lines](#) [Bid Factors](#) [Comments and Attachments](#) [Invited Bidders](#) [Constraints](#)

Filter By:

Event Line: First View All First 1 of 1 Last

Line Nbr: 1 Item ID: 0041404021 Description: Consulting

Line Summary

Field	Name	Date/Time	Action	Value	Update	*Update Action
Max Quantity	SS Collaborator 2	09/06/2011 12:20:14PM	Update	35000	<input checked="" type="checkbox"/>	Accept
Max Quantity	Original	09/06/2011 11:01:10AM	Update	18720	<input type="checkbox"/>	Accept
Max Quantity	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000	<input type="checkbox"/>	Reject

Comments

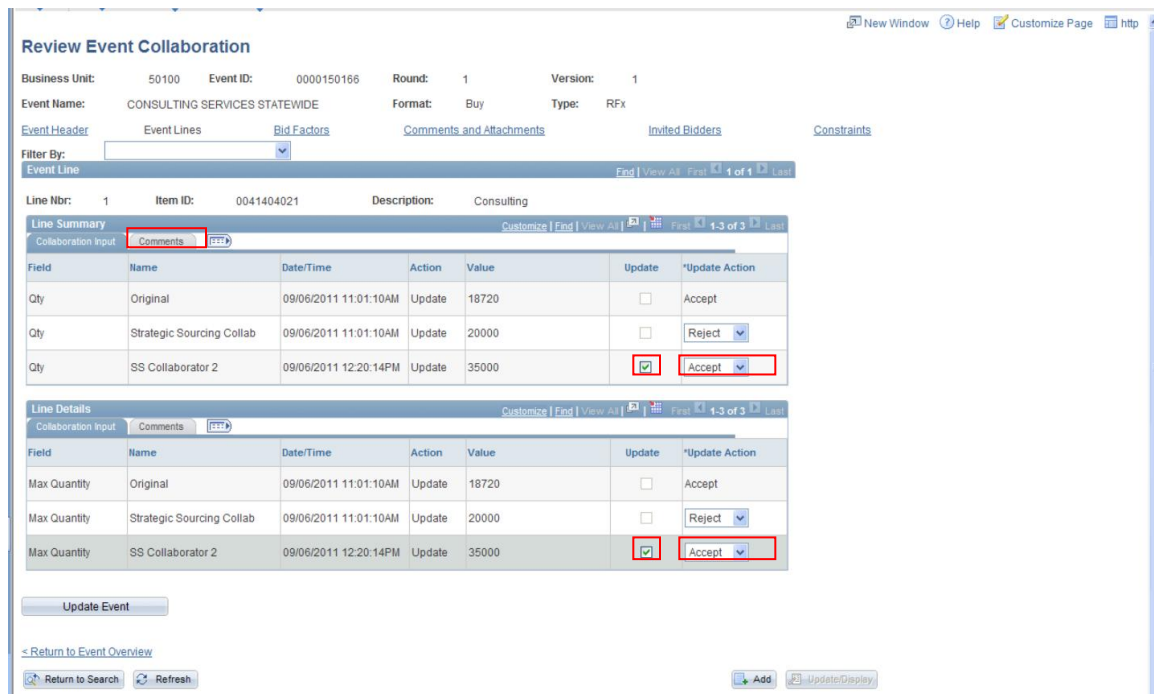
I am rejecting this amount for it needs to be higher.

I am accepting this quantity. The more the better!

[Return to Event Overview](#)

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

d. Click the **Update Event** button.



Review Event Collaboration

Business Unit: 50100 Event ID: 0000150166 Round: 1 Version: 1

Event Name: CONSULTING SERVICES STATEWIDE Format: Buy Type: RFx

Event Header Event Lines Bid Factors Comments and Attachments Invited Bidders Constraints

Filter By: [Dropdown]

Event Line: [Dropdown]

Line Nbr: 1 Item ID: 0041404021 Description: Consulting

Line Summary

Field	Name	Date/Time	Action	Value	Update	Update Action
Qty	Original	09/06/2011 11:01:10AM	Update	18720	<input type="checkbox"/>	Accept
Qty	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000	<input type="checkbox"/>	Reject
Qty	SS Collaborator 2	09/06/2011 12:20:14PM	Update	35000	<input checked="" type="checkbox"/>	Accept

Line Details

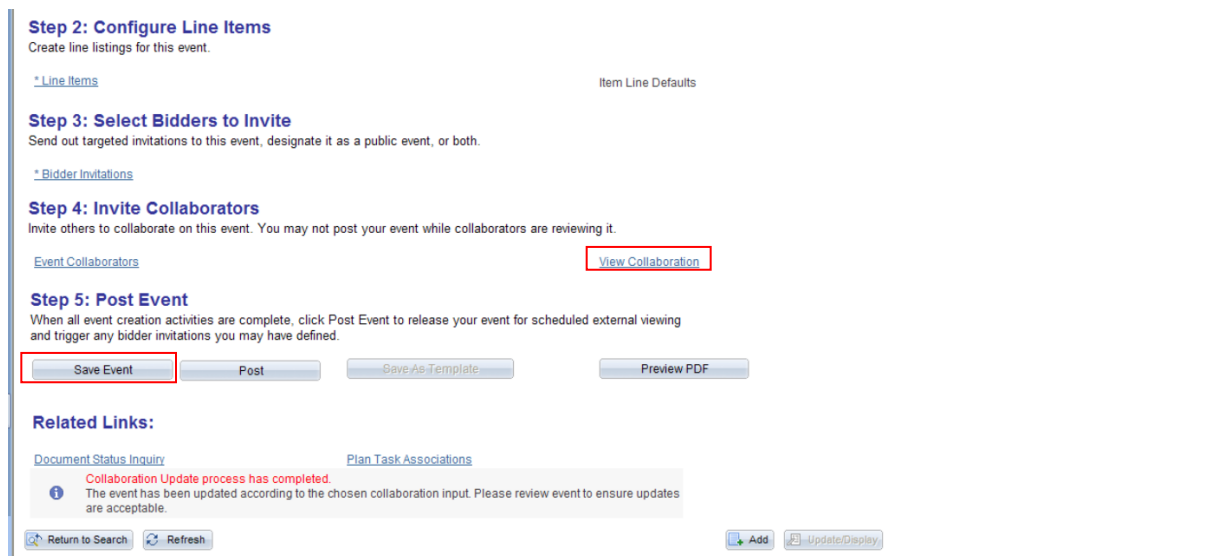
Field	Name	Date/Time	Action	Value	Update	Update Action
Max Quantity	Original	09/06/2011 11:01:10AM	Update	18720	<input type="checkbox"/>	Accept
Max Quantity	Strategic Sourcing Collab	09/06/2011 11:01:10AM	Update	20000	<input type="checkbox"/>	Reject
Max Quantity	SS Collaborator 2	09/06/2011 12:20:14PM	Update	35000	<input checked="" type="checkbox"/>	Accept

Update Event

[Return to Event Overview](#)

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

6 After accepting or rejecting all edits, click the **Save Event** button. The event is saved and its status changes to *Collaboration Update process has completed*.



Step 2: Configure Line Items

Create line listings for this event.

[Line Items](#) Item Line Defaults

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

[Bidder Invitations](#)

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#) [View Collaboration](#)

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

[Save Event](#) [Post](#) [Save As Template](#) [Preview PDF](#)

Related Links:

[Document Status Inquiry](#) [Plan Task Associations](#)

Collaboration Update process has completed.

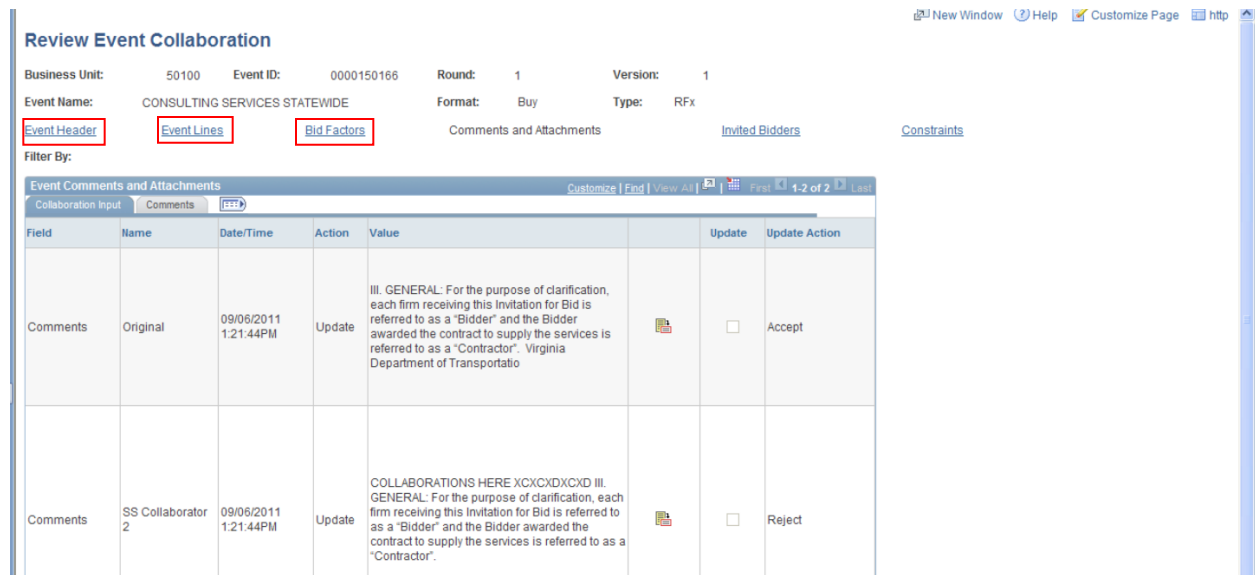
The event has been updated according to the chosen collaboration input. Please review event to ensure updates are acceptable.

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)

7 The collaboration actions appear with the action taken in the **Update Action** field. **NOTE:** You may click on any titled hyperlink to view the related collaboration.

8 To review the edits made to the event, click the **View Collaboration** hyperlink.

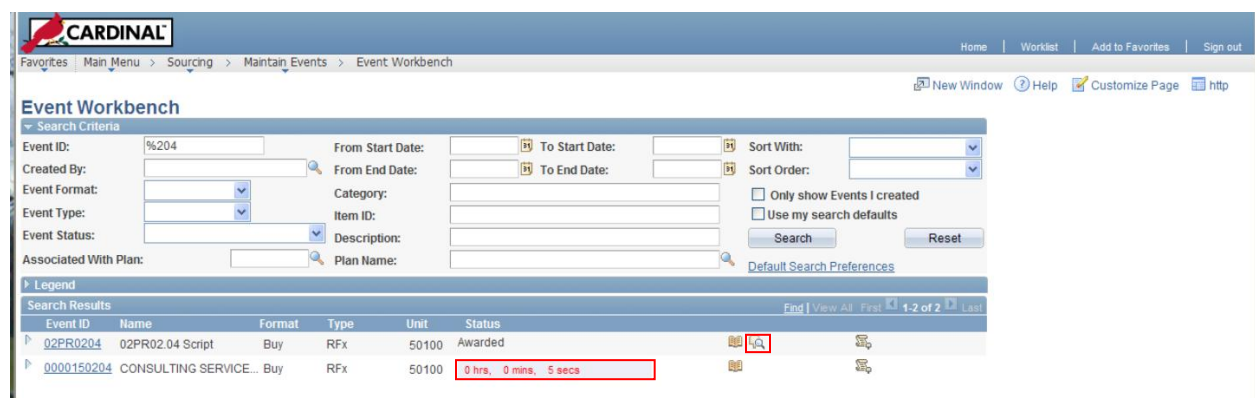
9 The **Review Event Collaboration** page appears.



- 10** The event can be posted for advertisement following the normal Strategic Sourcing process. **NOTE:** The system will show the countdown in the **Status** field from the **Event Workbench** page, which indicates how much time is left for collaboration.

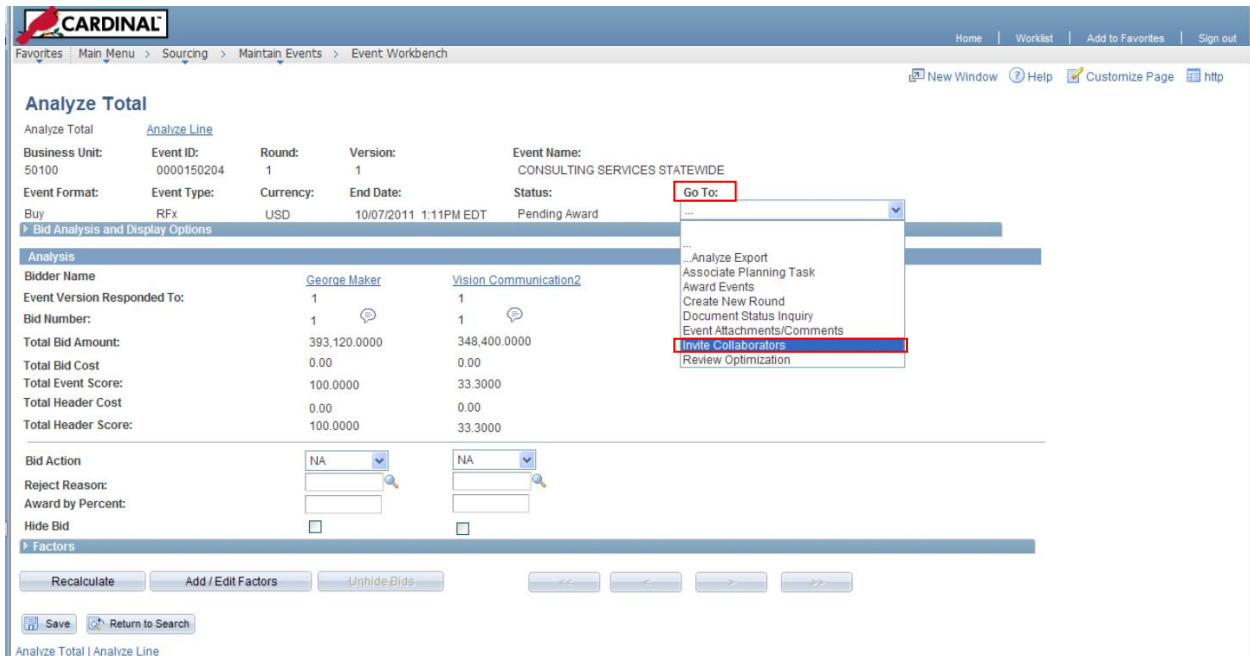
4. Invite Collaborators to Analyze Bids (SS Buyer):

- 1** Once the event is closed and all bids are received, the SS Buyer opens up a second version to add bidders and allow time for Bid Processors to add pricing. The Bid Processor enters the bids into Cardinal and notifies the SS Buyer. The SS Buyer analyzes the bid responses and may invite Collaborators for approvals or comments, prior to making the award. The SS Buyer may select Collaborators as necessary, such as:
 - a. Customer (user) for comments
 - b. Manager for approval
 - c. RFP Evaluation Committee members for scoring.

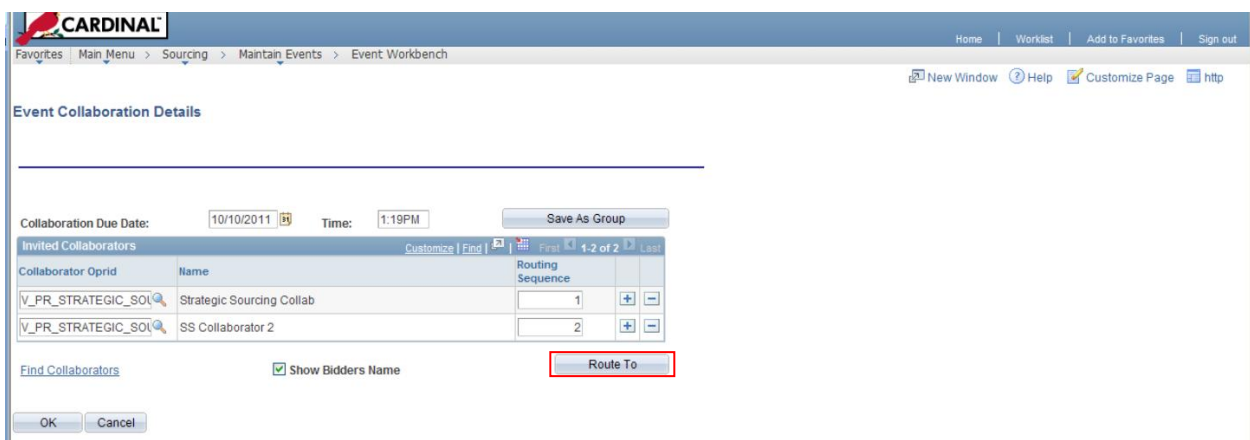


- 2** Navigate to **Main Menu > Sourcing > Maintain Events > Event Workbench**
- 3** Search for the event using the any combination of search criteria.

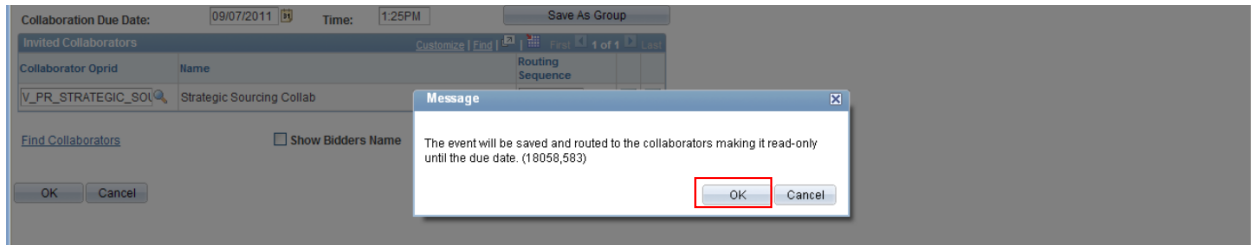
- 4 Click on the **Analyze Bids** icon to analyze the totals of the event. You cannot analyze bids of events with a status of **Open**.
- 5 The **Analyze Total** page appears.
- 6 Click the **Invite Collaborators** link from the **Go To** drop down menu. **NOTE:** *Collaborators may have previously reviewed and scored each response outside of Cardinal. Each Collaborator enters their scores into Cardinal for calculation.*



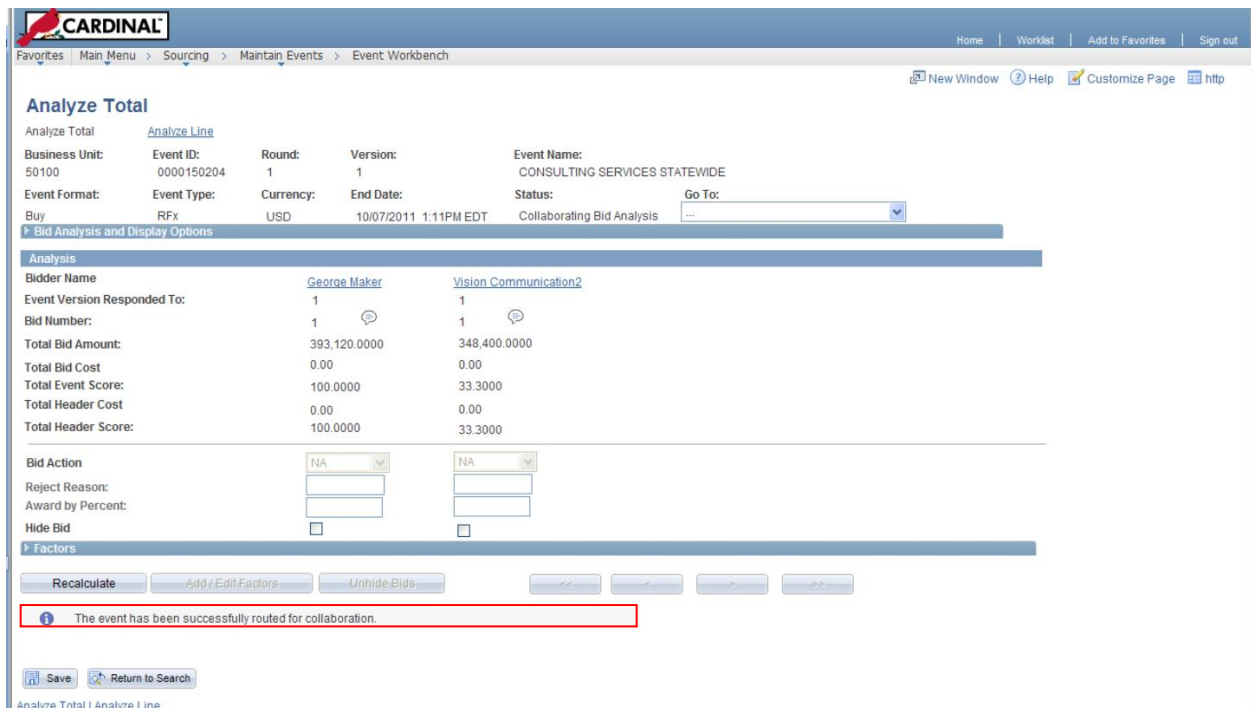
- 7 On the Event Collaboration Details page, clear all existing names in the **Collaborator Opid** field. Next, enter the Collaborator name (use the **Look Up** icon, if needed) for analysis collaboration. The **Routing Sequence** number is automatically populated.



- 8 Click the **Route To** button.
- 9 A routing message appears to make the event read-only until the Collaboration Due Date. Click the **OK** button.



- 10 The event is grayed out and has been routed for collaboration.



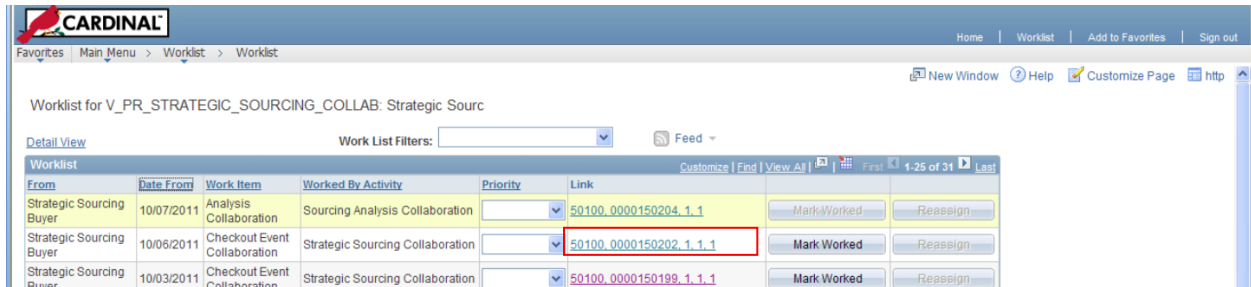
- 11 An item is added to each Collaborator's worklist. **NOTE:** Collaborators may score the event bids in any sequence or at any time, prior to the due date.

5. Collaborate on Bids (Collaborators):

- 1 An email notification and a worklist item is added to the Collaborators' worklists indicating that collaboration is needed.
- 2 To navigate to the worklist, go to **Main Menu > Worklist > Worklist**
- 3 The Worklist appears.
- 4 To collaborate on a bid, click the event hyperlink for the event you wish to collaborate on bids for. The event must be listed as **Checkout Event Collaboration** under the **Work Item** column.

Procurement Job Aid

Strategic Sourcing Collaboration

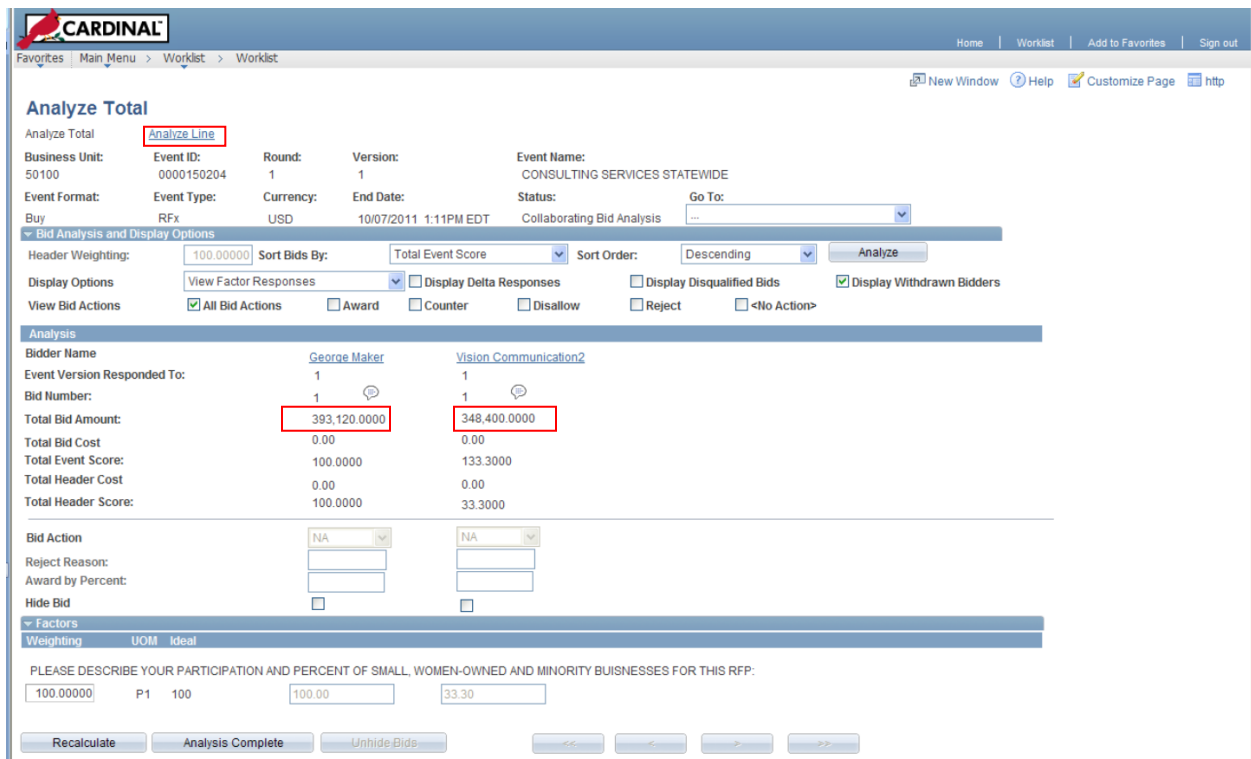


Worklist for V_PR_STRATEGIC_SOURCING_COLLAB: Strategic Sourc

Detail View Work List Filters: [] Feed []

From	Date From	Work Item	Worked By Activity	Priority	Link		
Strategic Sourcing Buyer	10/07/2011	Analysis Collaboration	Sourcing Analysis Collaboration		50100_0000150204_1_1	Mark Worked	Reassign
Strategic Sourcing Buyer	10/06/2011	Checkout Event Collaboration	Strategic Sourcing Collaboration		50100_0000150202_1_1_1	Mark Worked	Reassign
Strategic Sourcing Buyer	10/03/2011	Checkout Event Collaboration	Strategic Sourcing Collaboration		50100_0000150199_1_1_1	Mark Worked	Reassign

- 5 The **Analyze Total** page appears. Review the total pricing and bid factors. If applicable, text bid factors would be scored here.



Analyze Total

Analyze Total [Analyze Line](#)

Business Unit: 50100 Event ID: 0000150204 Round: 1 Version: 1 Event Name: CONSULTING SERVICES STATEWIDE

Event Format: Buy Event Type: RFx Currency: USD End Date: 10/07/2011 1:11PM EDT Status: Collaborating Bid Analysis Go To: []

Bid Analysis and Display Options

Header Weighting: 100.00000 Sort Bids By: Total Event Score Sort Order: Descending Analyze

Display Options View Factor Responses [] Display Delta Responses [] Display Disqualified Bids [] Display Withdrawn Bidders [x]

View Bid Actions [x] All Bid Actions [] Award [] Counter [] Disallow [] Reject [] <No Action>

Analysis

Bidder Name: George Maker Vision Communication2

Event Version Responded To: 1 1

Bid Number: 1 1

Total Bid Amount: 393,120.0000 348,400.0000

Total Bid Cost: 0.00 0.00

Total Event Score: 100.0000 133.3000

Total Header Cost: 0.00 0.00

Total Header Score: 100.0000 33.3000

Bid Action: NA NA

Reject Reason: [] []

Award by Percent: [] []

Hide Bid: [] []

Factors

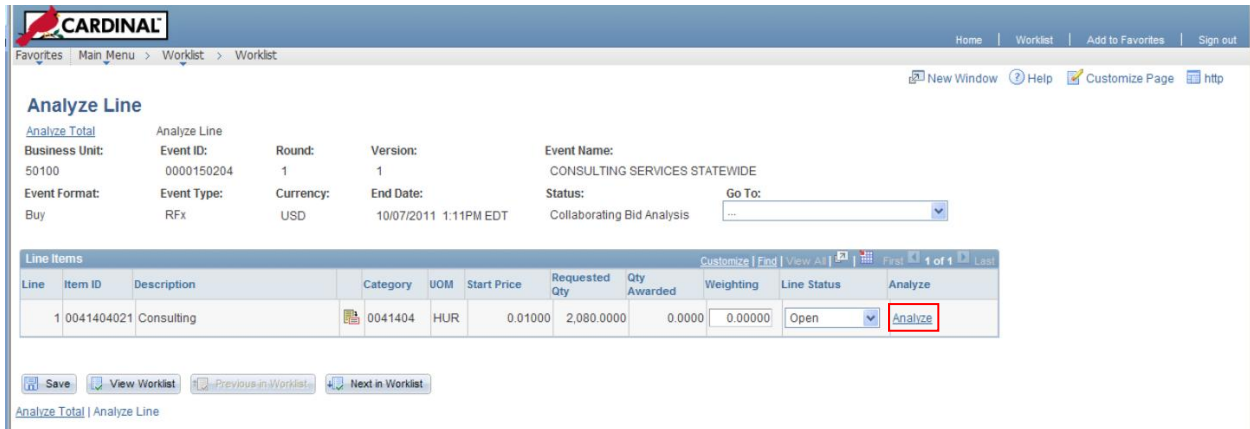
Weighting UOM Ideal

PLEASE DESCRIBE YOUR PARTICIPATION AND PERCENT OF SMALL, WOMEN-OWNED AND MINORITY BUSINESSES FOR THIS RFP:

100.00000 P1 100 100.00 33.30

Recalculate Analysis Complete Unhide Bids [] [] [] []

- 6 To analyze each bid by line, click the **Analyze Line** hyperlink.
- 7 The **Analyze Line** page appears.



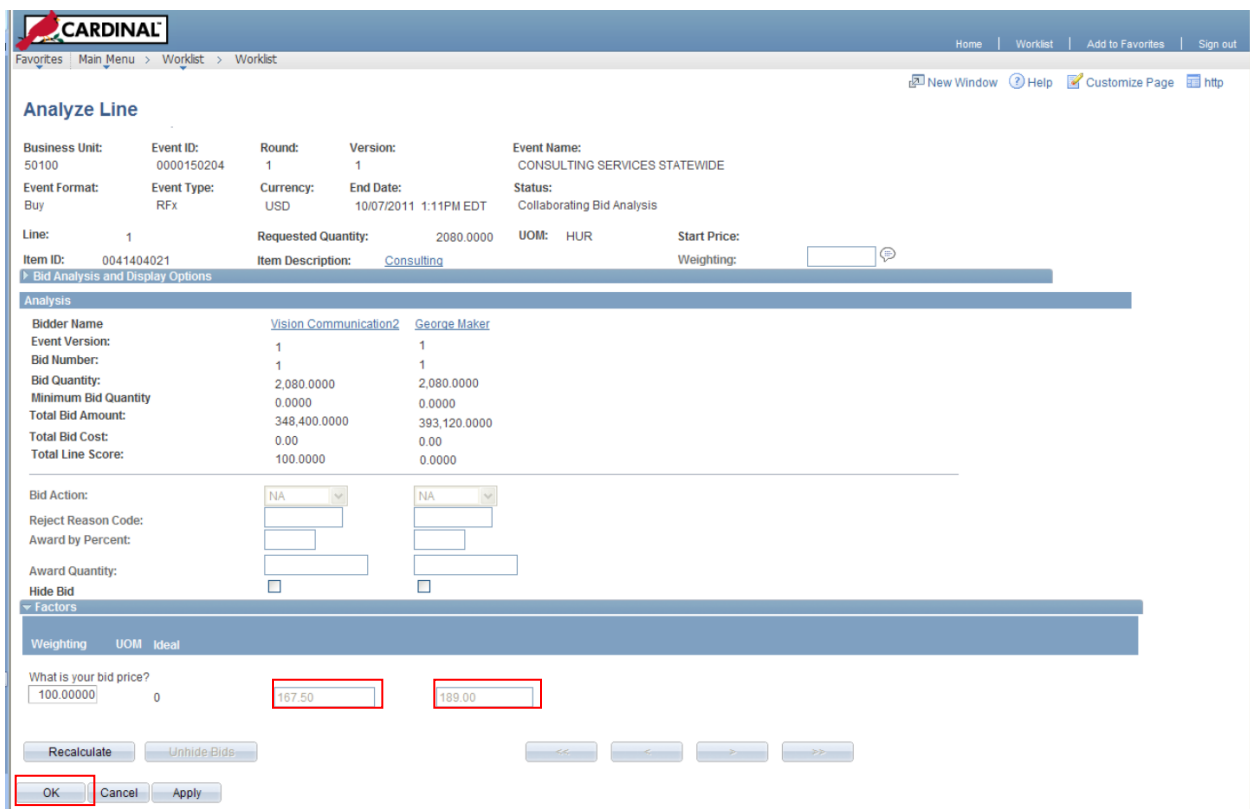
Analyze Line

Business Unit: 50100 Event ID: 0000150204 Round: 1 Version: 1 Event Name: CONSULTING SERVICES STATEWIDE

Event Format: Buy Event Type: RFX Currency: USD End Date: 10/07/2011 1:11PM EDT Status: Collaborating Bid Analysis

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	0041404021	Consulting	0041404	HUR	0.01000	2,080.0000	0.0000	0.00000	Open	Analyze

- 8 Click the **Analyze** hyperlink.
- 9 The **Analyze Line** page appears for the line item you selected.
- 10 Review the bid information price per UOM.



Analyze Line

Business Unit: 50100 Event ID: 0000150204 Round: 1 Version: 1 Event Name: CONSULTING SERVICES STATEWIDE

Event Format: Buy Event Type: RFX Currency: USD End Date: 10/07/2011 1:11PM EDT Status: Collaborating Bid Analysis

Line: 1 Requested Quantity: 2080.0000 UOM: HUR Start Price: []

Item ID: 0041404021 Item Description: Consulting Weighting: []

Analysis

	Vision Communication2	George Maker
Bidder Name	Vision Communication2	George Maker
Event Version:	1	1
Bid Number:	1	1
Bid Quantity:	2,080.0000	2,080.0000
Minimum Bid Quantity	0.0000	0.0000
Total Bid Amount:	348,400.0000	393,120.0000
Total Bid Cost:	0.00	0.00
Total Line Score:	100.0000	0.0000

Bid Action: [NA] [NA]

Reject Reason Code: [] []

Award by Percent: [] []

Award Quantity: [] []

Hide Bid: [] []

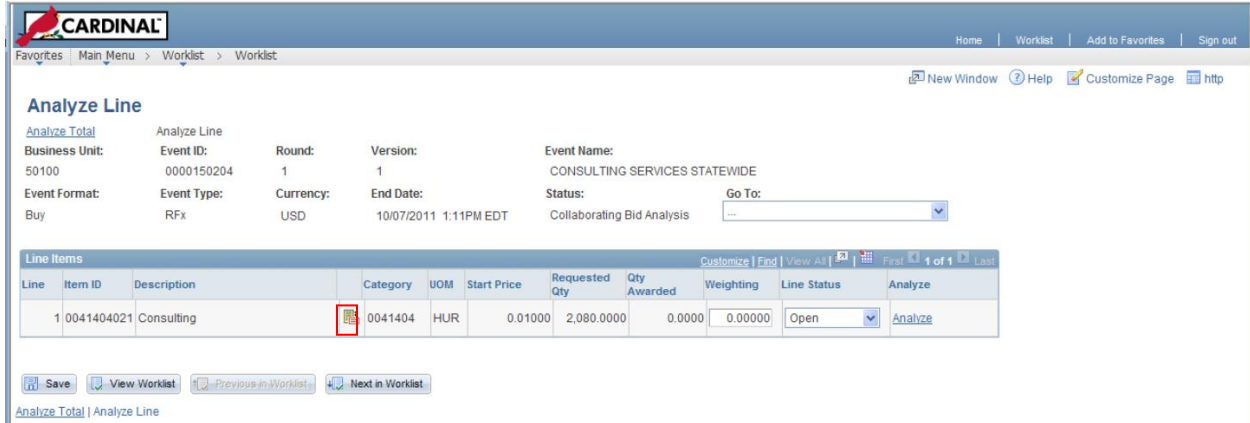
Factors

Weighting	UOM	Ideal
What is your bid price?		
100.00000	0	167.50 189.00

Recalculate Unhide Bids

OK Cancel Apply

- 11 Click the **OK** button.
- 12 To enter comments on the bid line, click on the **Item Description** icon.



Analyze Line

Business Unit: 50100 Event ID: 0000150204 Round: 1 Version: 1 Event Name: CONSULTING SERVICES STATEWIDE

Event Format: Buy Event Type: RFX Currency: USD End Date: 10/07/2011 1:11PM EDT Status: Collaborating Bid Analysis Go To: [Dropdown]

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	0041404021	Consulting	0041404	HUR	0.01000	2,080.0000	0.0000	0.00000	Open	Analyze

Buttons: Save, View Worklist, Previous in Worklist, Next in Worklist

- Enter comments in the **Item Description**. **NOTE:** Any comments you enter here are carried over to any events that are copied from this one in the future. It is therefore recommended to not use the copy functionality on events with comments added with the item description.



Item Description

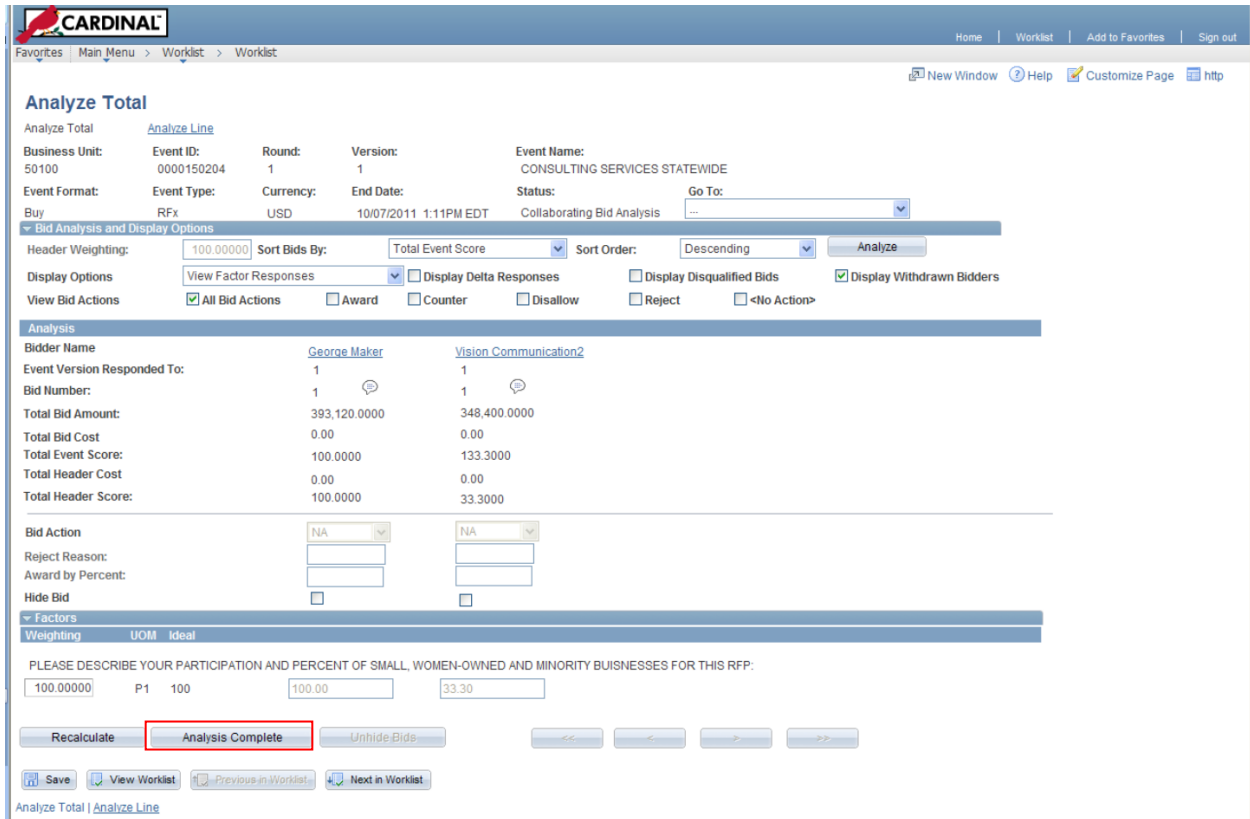
Item Description: You are approved to make an award MH 10/7/11

Preferred Language Item Descr: You are approved to make an award MH 10/7/11

Buttons: OK, Cancel

- Click the **OK** button.

13 After you have reviewed all of the bids and entered comments, click the **Analysis Complete** button.



Analyze Total

Business Unit: 50100 | Event ID: 0000150204 | Round: 1 | Version: 1 | Event Name: CONSULTING SERVICES STATEWIDE

Event Format: Buy | Event Type: RFX | Currency: USD | End Date: 10/07/2011 1:11PM EDT | Status: Collaborating Bid Analysis

Bid Analysis and Display Options

Header Weighting: 100.00000 | Sort Bids By: Total Event Score | Sort Order: Descending | Analyze

Display Options: View Factor Responses | Display Delta Responses | Display Disqualified Bids | Display Withdrawn Bidders

View Bid Actions: All Bid Actions | Award | Counter | Disallow | Reject | No Action

Bidder Name	George Maker	Vision Communication2
Event Version Responded To:	1	1
Bid Number:	1	1
Total Bid Amount:	393,120.0000	348,400.0000
Total Bid Cost:	0.00	0.00
Total Event Score:	100.0000	133.3000
Total Header Cost:	0.00	0.00
Total Header Score:	100.0000	33.3000

Analysis

Weighting: UOM Ideal

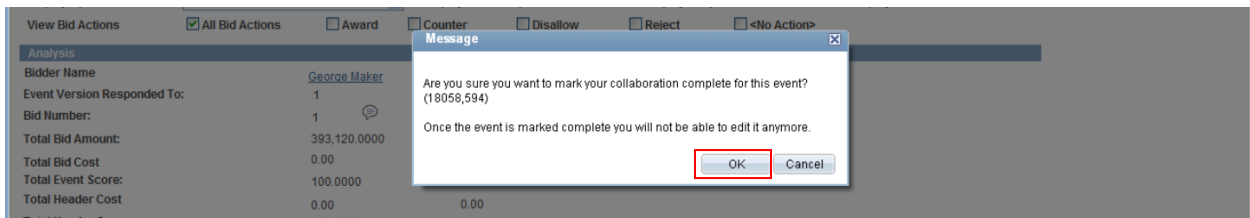
PLEASE DESCRIBE YOUR PARTICIPATION AND PERCENT OF SMALL, WOMEN-OWNED AND MINORITY BUSINESSES FOR THIS RFP:

100.00000 | P1 100 | 100.00 | 33.30

Recalculate | Analysis Complete | Unhide Bids

Save | View Worklist | Previous in Worklist | Next in Worklist

- 14 A message appears. Click the **OK** button to confirm that you do not wish to make further edits.
- 15 An email notification and a worklist item is added to the SS Buyer worklist indicating that collaboration is complete by all selected Collaborators.



Message

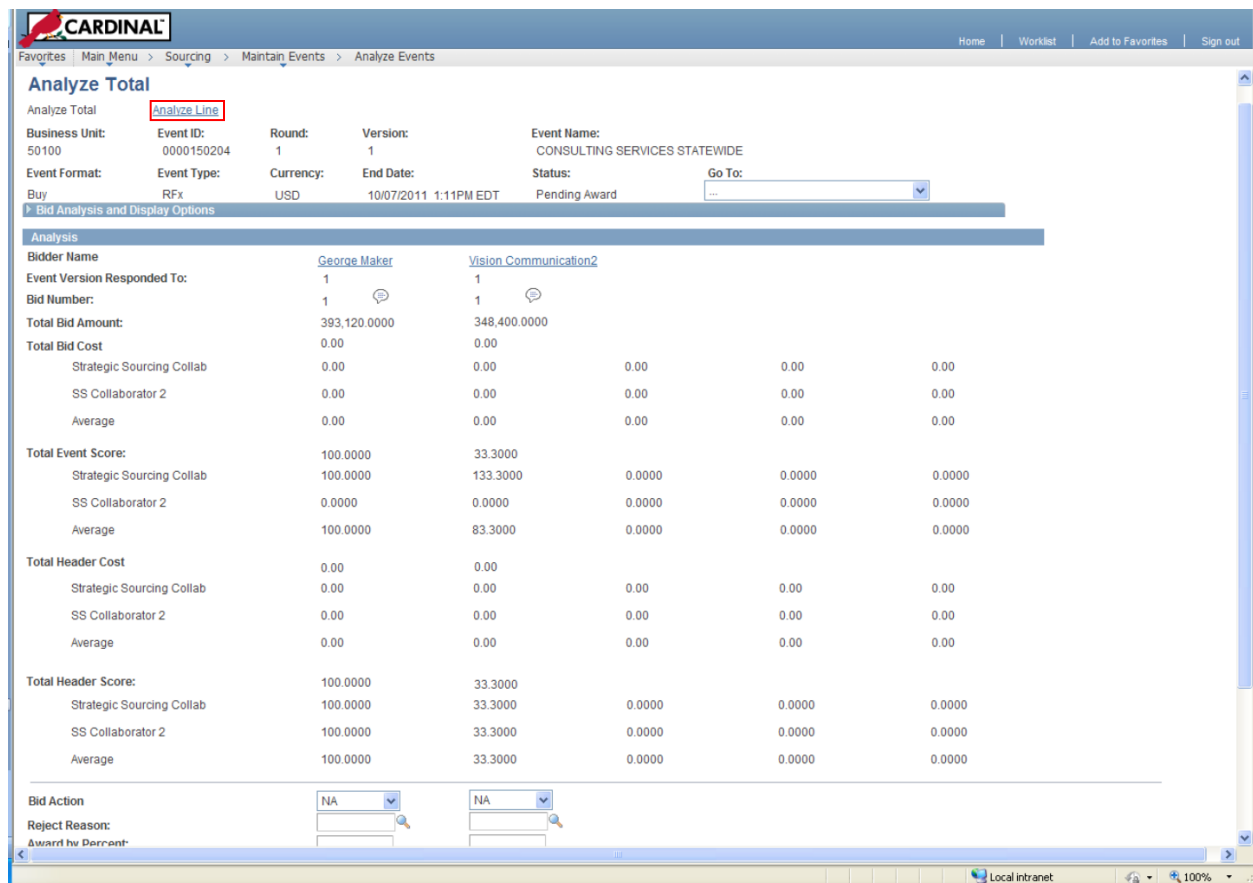
Are you sure you want to mark your collaboration complete for this event?
(18058,594)

Once the event is marked complete you will not be able to edit it anymore.

OK Cancel

6. Review Collaborators Input on Bids (SS Buyer):

- 1 To review collaborator input on bids, navigate to *Main Menu > Worklist > Worklist*
- 2 Click the **Event Analysis Collaboration** hyperlink from the email notification or click the item in the worklist that has **Analysis Collaboration** listed in the **Event Status** column.
- 3 View Collaborator scores, as applicable.



Analyze Total

Business Unit: 50100 Event ID: 0000150204 Round: 1 Version: 1 Event Name: CONSULTING SERVICES STATEWIDE

Event Format: Buy Event Type: RFx Currency: USD End Date: 10/07/2011 1:11PM EDT Status: Pending Award

Analysis

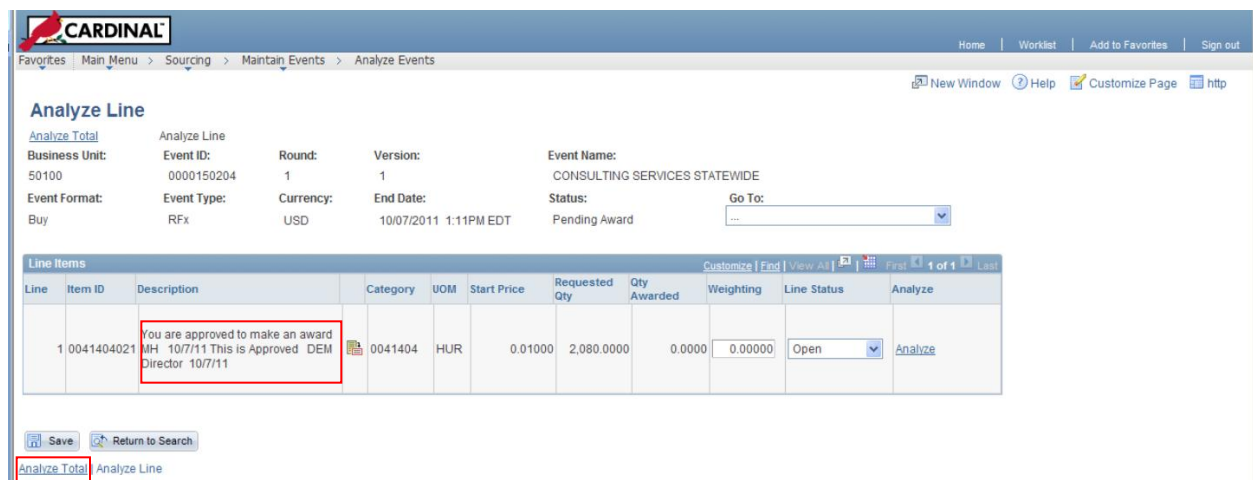
	George Maker	Vision Communication2
Bidder Name	George Maker	Vision Communication2
Event Version Responded To:	1	1
Bid Number:	1	1
Total Bid Amount:	393,120.0000	348,400.0000
Total Bid Cost:	0.00	0.00
Strategic Sourcing Collab	0.00	0.00
SS Collaborator 2	0.00	0.00
Average	0.00	0.00
Total Event Score:	100.0000	33.3000
Strategic Sourcing Collab	100.0000	133.3000
SS Collaborator 2	0.0000	0.0000
Average	100.0000	83.3000
Total Header Cost:	0.00	0.00
Strategic Sourcing Collab	0.00	0.00
SS Collaborator 2	0.00	0.00
Average	0.00	0.00
Total Header Score:	100.0000	33.3000
Strategic Sourcing Collab	100.0000	33.3000
SS Collaborator 2	100.0000	33.3000
Average	100.0000	33.3000

Bid Action: NA NA

Reject Reason:

Award by Derment:

- Click the **Analyze Line** hyperlink.
- Any Collaborator comment(s) appear in the **Description** field of each line.



Analyze Line

Business Unit: 50100 Event ID: 0000150204 Round: 1 Version: 1 Event Name: CONSULTING SERVICES STATEWIDE

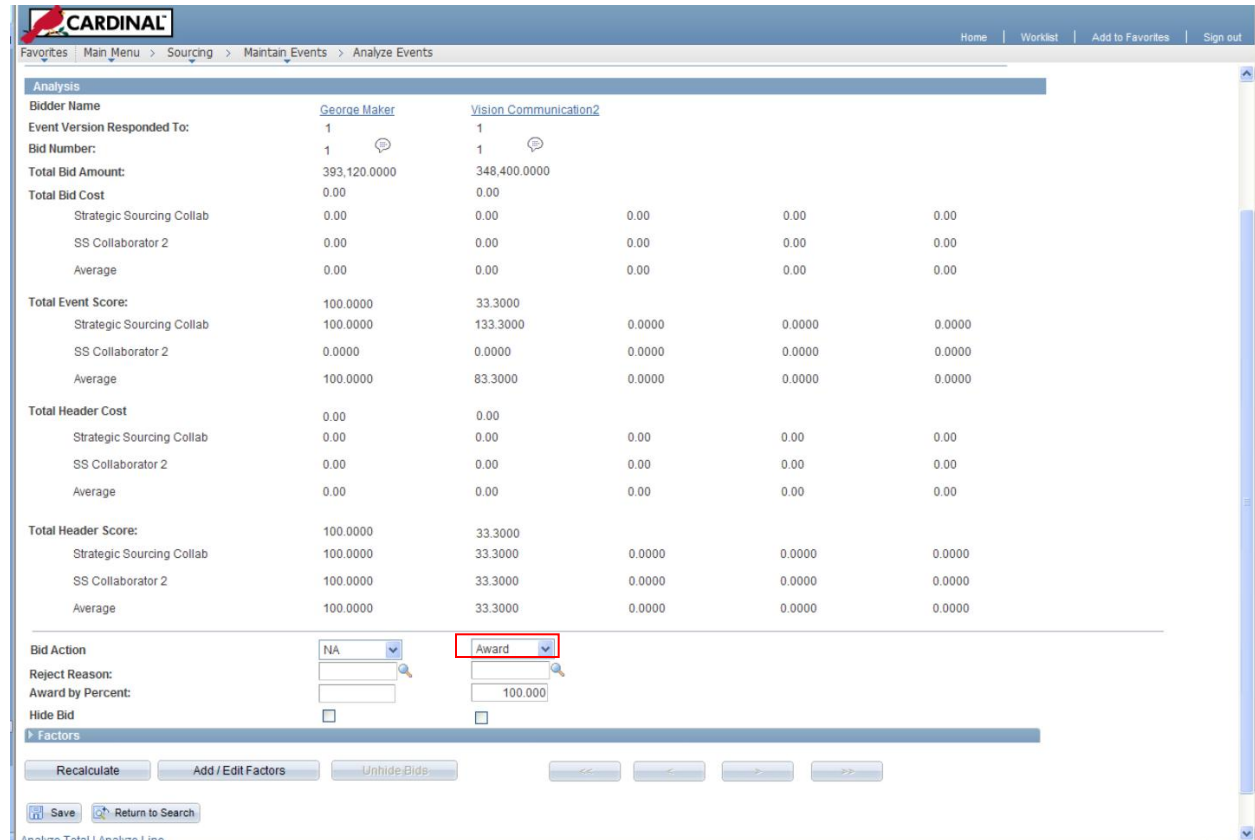
Event Format: Buy Event Type: RFx Currency: USD End Date: 10/07/2011 1:11PM EDT Status: Pending Award

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	10041404021	You are approved to make an award MH 10/7/11 This is Approved DEM Director 10/7/11	0041404	HUR	0.01000	2,080.0000	0.0000	0.00000	Open	Analyze

Save Return to Search

Analyze Total Analyze Line

- After reviewing the scores and comments, click the **Analyze Total** hyperlink.



Analysis

	George Maker	Vision Communication2
Bidder Name	George Maker	Vision Communication2
Event Version Responded To:	1	1
Bid Number:	1	1
Total Bid Amount:	393,120.0000	348,400.0000
Total Bid Cost	0.00	0.00
Strategic Sourcing Collab	0.00	0.00
SS Collaborator 2	0.00	0.00
Average	0.00	0.00
Total Event Score:	100.0000	33.3000
Strategic Sourcing Collab	100.0000	133.3000
SS Collaborator 2	0.0000	0.0000
Average	100.0000	83.3000
Total Header Cost	0.00	0.00
Strategic Sourcing Collab	0.00	0.00
SS Collaborator 2	0.00	0.00
Average	0.00	0.00
Total Header Score:	100.0000	33.3000
Strategic Sourcing Collab	100.0000	33.3000
SS Collaborator 2	100.0000	33.3000
Average	100.0000	33.3000

Bid Action:

Reject Reason:

Award by Percent:

Hide Bid: ☐

Factors

Recalculate Add / Edit Factors Unhide Bids

Save Return to Search

- 7 Make the award and follow normal Strategic Sourcing processes to select the vendor to award to. More information is in the **PROC347: Strategic Sourcing** course.